• **Special report: how Americans use OTC products**

PHARMACY℞

Study shows moderate OTC use

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different ages, income levels, sexes and race used OTC's. The only major difference was that the elderly, those with lower incomes and less education used professional help more often than other Americans, and pregnant women used self medication the least: Only 18% used OTC's compared to 33% in the population at large.

The more serious the problem, the more likely Americans are to seek medical help. Infections, ulcers and asthma had high levels of professional involvement, while problems like age or liver spots, baldness, over- or underweight and bruises were generally ignored.

Over-the-counter products were used most commonly to treat such problems as headaches, lip problems, athlete's foot, chronic dandruff and the common cold.

The study also showed that the majority of Americans are cautious about the way they ingest self medication. Only those Americans with relatively serious discomfort chose to use an OTC product on the first day of their problem: 81% of those who had over-indulged in alcohol, for instance, did use an OTC on the first day.

In contrast, just 16% of those with bunions or calluses used OTC treatments the first day as did 19% of those with acne problems and 24% of those with athlete's foot.

The overall satisfaction level with OTC products was high: 92% of all those who used OTC products said they were satisfied. But certain remedies elicited even higher levels of satisfaction. For instance, 98% of those respondents who used OTC to treat back problems, 97% who used OTC's to treat minor cuts, scratches and premenstrual problems and 96% who used OTC's for upset stomachs, indigestion and insect bites reported they were satisifed.

A majority of consumers said package labels and pharmacists help them decide which medication to take.

Careful consumers detail self-medication practices

According to the findings of the Proprietary Association's recent study of medication treatment patterns, the average American has a highly responsible attitude toward self-treating their medical symptoms.

Ninety-five per cent of the respondents in the survey agreed that a consumer should be "careful" when using OTC's, and 96% agreed that a consumer should read the instructions before taking an OTC for the first time and that they should only take medication when it was "absolutely necessary."

Ninety-five per cent of the respondents said they felt it was *not* safe to take as many OTC's as they might wish.

Only 10% of the respondents believed prescription products were more effective than OTC's, and over 70% believed that OTC products are just as effective as prescription products "for some problems."

Over 85% said that reading package labels was one way to decide which OTC to take while 70% said a pharmacist can be a "good source of information" and that advertising also helps them both in deciding what to take and learning what is available.

Instead of taking too many OTC's or taking them too often, 40% of the respondents in the study reported they took one product per problem.

Nine out of 10 respondents said that when they stopped using OTC's, it was because their problem had gone away.

Nearly 8 out of 10 respondents in the study (76%) agreed with the statement that if you took a medication too often, it might not be effective when you really need it to work.

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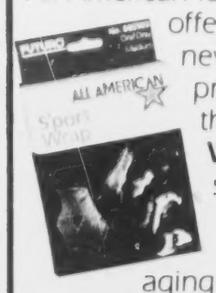

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P.A. study surveys 1,500

The Proprietary Association's study of self-medication was conducted among a nationally representative sample of 1,500 respondents over the age of 13.

Prior to the actual survey, which was conducted by the Harry Heller Research Corp., respondents were screened to determine if they fit into a specific age group and if they would participate. Mothers of children under 12 were asked to respond to questions about their offspring. The resulting study is based on 1,230 interviews with respondents 18 and over; 263 teenagers and 569 mothers of children under 12.

Those participating in the study were mailed a package of materials with a dollar to encourage cooperation. They were called about a week later and interviewed.

First they were questioned about a "problem" list inside the package that contained 68 different ailments. They were asked which problems they had experienced over the past two weeks and about the symptoms. They were then asked to identify the method of treatment, if any, on the first day the symptoms appeared. They were also asked what was done on the following days.

Respondents then were questioned about the type of medication used; if they were still using it; if not, why they stopped, and whether they were satisfied with the medication. After these questions demographic information about the participant's household and family was collected.

Finally, the respondents answered a self-administered questionnaire about their attitudes toward self-medication, their activities and health records over the past year. The questionnaire was sent to the Heller Research Corp.

In a two-week testing period, consumers reported 78 different ailments ranging from respiratory problems to being overweight.

Skin ailments top list of consumer complaints

During a two-week period of time, over 50% of those surveyed by the Proprietary Association said they most frequently suffered from pain: with problems associated with general well-being, and with conditions of the skin.

Respondents reported on 78 different problems, which were divided into the following seven areas: skin, pain, general well-being, respiratory, eye/ear/mouth, digestive symptoms and feminine.

The largest number of those surveyed, 67%, complained of a variety of skin ailments, and the most frequently reported problems included minor cuts and scratches; acne and pimples; bruises, insect bites and stings. Other complaints included dry skin, sunburn, dandruff and athlete's foot.

The second-largest group, 57%, said they experienced pain—generally muscle aches, headaches, arthritis, rheumatism and back problems. Others reported pain associated with injuries, migraine headaches and bursitis.

Some 53% of those surveyed reported problems with general well-being, such as overweight, fatigue, sleeping problems and anxiety. The remainder said they suffered underweight problems, motion sickness, dehydration and fainting.

In the respiratory category, 49% reported such problems—as colds, sinus ailments, hay fever and related allergies. Others said they had sore throats and coughs not associated with colds; virus and flu, asthma, and bronchitis

Forty-four per cent of the respondents had eye/ear/mouth problems: minor eye problems; lip problems, and tooth problems. Others reported ailments with their ears or gums.

They were followed by some 40% who had digestive system problems: upset stomachs; indigestion; over-indulgence of food; diarrhea and constipation. Others said they suffered from over-indulgence of alcohol and ulcer problems.

In the last group, 27%, reported feminine ailments. Problems were premenstrual, vaginal and ailments associated with menopause.

The most frequently reported problems was over-weight (30%).

The study also found that women are more likely to report suffering from overweight problems, while men more frequently complained of minor cuts and bruises.

Most frequently reported medical problems*

Problem	% of adults
Overweight	28
Upset stomach/ indigestion	25
Muscle aches and pains	25
Minor eye problems	22
Headaches	21
Minor fatique	20
Minor cuts/scratches	19
Common cold	19

*% of adults experiencing problem over two-week period

Source: Proprietary Association

Youngsters record most doctor visits

Of the 9,148 problems reported in the Proprietary Association survey, only 9% were taken to a doctor or dentist, and the groups and who were more likely to seek professional help were the very young, the old, the poor and the less-educated.

The study reported that the ailments usually taken to doctors are those which can be more serious, with acute or painful symptoms and those which require professional diagnosis or therapy.

The ailment most often treated by a professional—36%—was skin infection. It was followed by ulcers, 33%; asthma, 32%; tooth and ear problems, 28%, and virus and flu, 26%. Other professionally treated ailments were pain associated with injury, arthritis/rheumatism and back problems.

The survey showed that only 7% of adults aged 18-34 sought professional treatment compared to 11% of those between the ages of 35 and 64 and 13% of those over 65. The largest percentage of those seeking professional help—15%—were children 12 or younger.

The study hypothesizes that because parents are more cautious about their children's health than their own, a youngster's ailment is less likely to be ignored.

The survey also revealed that 11% of the female teenagers surveyed contacted doctors for ailments as compared to 8% of the males their age.

Other findings included:

- That 10% of the female respondents contacted doctors compared to 8% of the males.
- That 12% of the black respondents sought professional treatment compared to 3% of the white.
- That 11% of those who had a high school education or less sought a doctor's treatment compared to 7% of those with a college education.

Problems most likely to be referred to a doctor or dentist

Problems	% of respondents
Infections	36
Ulcers	33
Asthma	32
Teeth problems	28
Ear problems	28
Virus/flu/ influenza	26

Source: Proprietary Association

Common discomfort frequently ignored

Most adults either tend to ignore minor health problems or treat them with home remedies, giving little heed to even those ailments that could become serious over a long period of time.

According to a Proprietary Association survey, 37% of a total of 9,148 reported ailments were ignored and another 14% were treated with home remedies. Together these choices make up 51% of the possible actions respondents could have taken about an ailment. This compares to the 35% of problems treated with over-the-counter drugs.

While the most commonly ignored problem was not a health-threatening condition—age spots—that go untreated 87% of the time—53% said they did nothing for diarrhea, that could become a more serious affliction over time. The same is true for a cough not associated with a cold, which was ignored 46% of the time.

Other frequently ignored problems were bruises, 75%; baldness, 74%; insomnia, 70%; underweight, 67%; minor fatigue, 61%; overindulgence of food, 57%, and minor anxiety, 54%.

The study showed that home remedies were most frequently used to treat skin problems. For example, most respondents, 41%, said they treated ingrown toenails by soaking their feet in hot water. Another 33% said they dealt with gum problems by rinsing with salt water.

Other common home remedies were water or butter for burns other than sunburn, 29%; hot liquid for sore throat not associated with cold, 28%, and "home brew" for overindulgence of alcohol, 24%.

Others said they used hot or cold compresses or a heating pad to treat pain associated with injury; adhesive bandages for cuts and scratches, soap and water for acne; diet for weight problems, and hot soakings for bunions, corns or calluses.

Headaches: No. 1 use for OTC's

Adults treat headaches with over-the-counter medication more often than any other ailment, according to a survey conducted by the Proprietary Association.

Yet headaches are fifth on a list of most frequently occurring problems reported during a two-week testing period. Respondents said they suffered weight problems and indigestion most often. However, OTC medications for these problems are not among the top 10 used.

The survey reports that of the 9,148 problems reported, 35% are treated with OTC medications. The ailments in this category tend to be those that are annoying or those that make daily functioning difficult if the symptoms are not alleviated.

And of those who use OTC medications, the largest percentage—46%—are children 12 years old and younger. This may indicate that parents are cautious about their children's health and will administer medication for minor problems. The same ailments, suffered by adults may often be ignored.

Problems most likely treated with self-medication or nonprescription products

Problems	% of respondents
Headaches	71
Lip problems	70
Athlete's foot	66
Chronic dandruff	61
Common cold	60
Migraine headaches	59
Dry skin	58

Source: Proprietary Association

Of the problems suffered by adults, 71% of all headaches were treated with OTC drugs. This was followed by lip problems, 66%; athlete's foot, 61%, and chronic dandruff, 60%. Other ailments that were treated over 50% of the time with OTC medications were the common cold, migraine headaches, painful dry skin, menstrual, premenstrual and sinus problems.

OTC medications are used more frequently by females, according to the survey. Of the adults questioned, 35% of the women said they used OTC medications, compared to 30% of the men. Of the teenagers surveyed, 41% of the females used medication compared to 38% of the males.

There had been some expectation that the elderly would be using nonprescription medicines because they couldn't afford professional health care. However, this did not prove to be the case. In fact, there was only one percentage point difference in usage among the three following age groups: 18-34 years, 34%; 35-64 years, 33%, and 65 and over, 35%.

How Americans tend to treat medical problems

Method	% of respondents
Did not treat	37
Used an OTC medicine	35
Used a home remedy	14
Used prescription medicine in the home	11
Called went to a doctor or dentist	9

Source: Proprietary Association

MERCHANDISER

Mini-electronics make small-sized batteries big

With many consumer electronics products shrinking in size, sales growth in the small-size battery category is expected to outstrip gains made in the larger-sized batteries in the next few years.

The new miniature cassette player recorders, radios and calculators that have swept the country in recent years have led to an upsurge in demand for double A, triple A and button cell batteries.

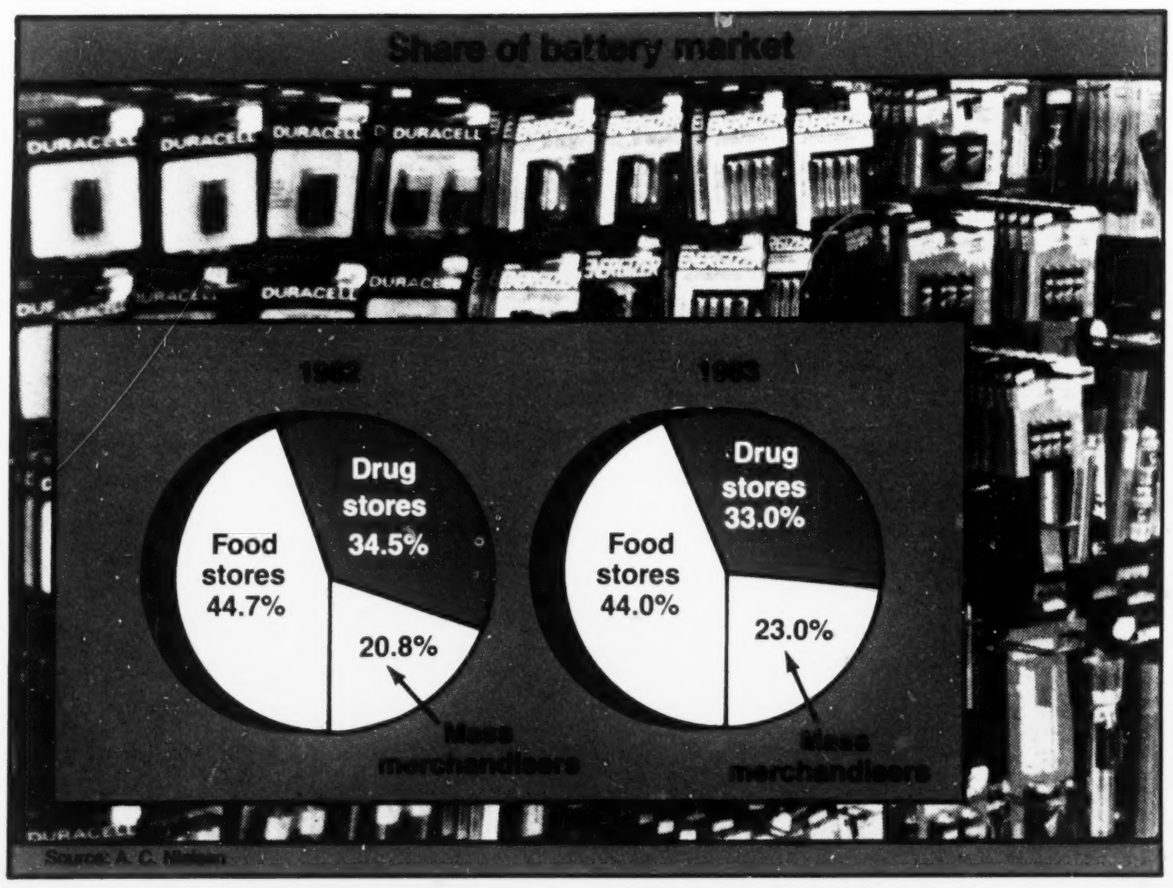
The shift in the battery market has provided a degree of uncertainty to a normally stable category. Retailers have reacted by stocking additional sku's of small batteries. In addition, some chains, which in the past have merchandised "button cell" batteries in jewelry, photo and consumer electronics departments, are now placing blister-packed "button cells" with their conventional batteries.

The battery category is generally regarded by many drug retailers as a good profit center that can also be used to bring people into the stores. Margins can frequently range from 30% to 40%, depending on deals from manufacturers. Turns usually average five to eight times a year.

Chains allocate approximately 4 ft. to 6 ft. for batteries in most stores. The displays are usually placed in the front end of the store to stimulate impulse sales or in the photo and electronics departments where they provide a natural complement to that merchandise.

Unlike many other price-sensitive drug store categories, consumers are less likely to shop around for the best prices on batteries. Consequently, drug retailers say that batteries can generate a healthy return on investment.

The growth of the smaller-sized batteries also comes at a time when more consumers are switching to alkaline batteries. According to one industry source, the alkalines controlled approximately 65% of the market in 1982. That compared with 18% for heavy-duty batteries and 16% for general-purpose batteries.



Industry projections are that the alkaline category will continue to grow at a rate of about 12% a year. By 1987, alkalines may account for as much as 71% of the total sales. Heavy-duty batteries may represent 20% of the market, while the general-purpose batteries are expected to dwindle to about 9%.

Overall, chain drug battery sales increased by 10% last year, according to figures from A. C. Nielsen. The drug segment, including both chains and independents, controlled approximately 33% of the market in 1983, down from 34.5% in 1982. However, chains managed to actually increase their share of the retail drug market, going from 78% in 1982 to 79% in 1983.

Mass merchandisers made the biggest gains in the battery category last year. The discounters were able to increase their share of the market from 20.8% in 1982 to 23% in 1983. The food segment dropped slightly from 44.7% to 44%.

While retailers expect strong gains in the small battery category, particularly the double A segment, sales of D size alkalines have also increased. Buyers attribute much of the increase to the growing popularity of large box radios.

In the alkaline category, which accounts for approximately 55% of all chain drug battery sales, D size batteries represent about 18% of sales. Double A batteries are the biggest seller with approximately 45% of the category sales. C batteries and 9-volts account for 16% and 9%, respectively. Lantern batteries, triple A and button cells make up the remaining 12%. However, industry sources say that the recent growth of the button cells and triple A batteries has probably been understated.

Retailers say that the 9-volt battery segment is declining in importance, mainly because manufacturers of toys and electronics have been switching to double A and in some instances to triple A batteries as the power source.

One chain in the Midwest reported sales of 9-volt batteries were down 20% to 30% last year, but that sales of double A batteries rose more than 30%.

Another major development in the battery category last year was the increasing number of chains which have begun selling rechargeable batteries. With nearly all of the major battery manufacturers currently marketing rechargeables, the category is expected to be a factor over the next few years.

But while chains such as Skaggs, Walgreens and Eckerd and smaller retailers like Lewis Self Service Drugs in Sioux Falls, S.D., are carrying a limited selection of rechargeables, many chain buyers say it is still too early to predict their success.

One of the big problems with the rechargeable category, buyers say, is educating consumers about the long-term benefits. The prices of rechargeables are often two to three times higher than disposable batteries. And if a consumer also has to spend between $9 and $15 for a charging unit, the initial purchase can cost more than $25 in some cases for two batteries and a charger.

However, manufacturers of nickel cadmium rechargeable batteries say that they could account for as much as 5% of all retail battery sales within the next three years.

Merchandising skill moves frames at Guild unit

The Guild store in Newport Beach, Calif., a high-income city, which borders even higher-income Corona Del Mar, does more volume in picture frames than any of the other 10 stores in the chain.

Certainly it helps to have affluent shoppers who take a lot of pictures—but competition is more intense here, too.

So it boils down to merchandising skills—and that's where store manager Jim Hoover excels. Hoover is the dean of Guild managers, having been with the chain for 18 years, 17 as a manager.

"Use the gondola end for an uptraded line of frames," is one of Guild store manager Jim Hoover's 10 commandments.

"Picture frames are often viewed as "just another department," he says. "But not in my book. Any category that yields 40% to 50% gross margins, with unit prices up to $20 and six turns a year—with an inventory investment of $800 at retail—is worth working at."

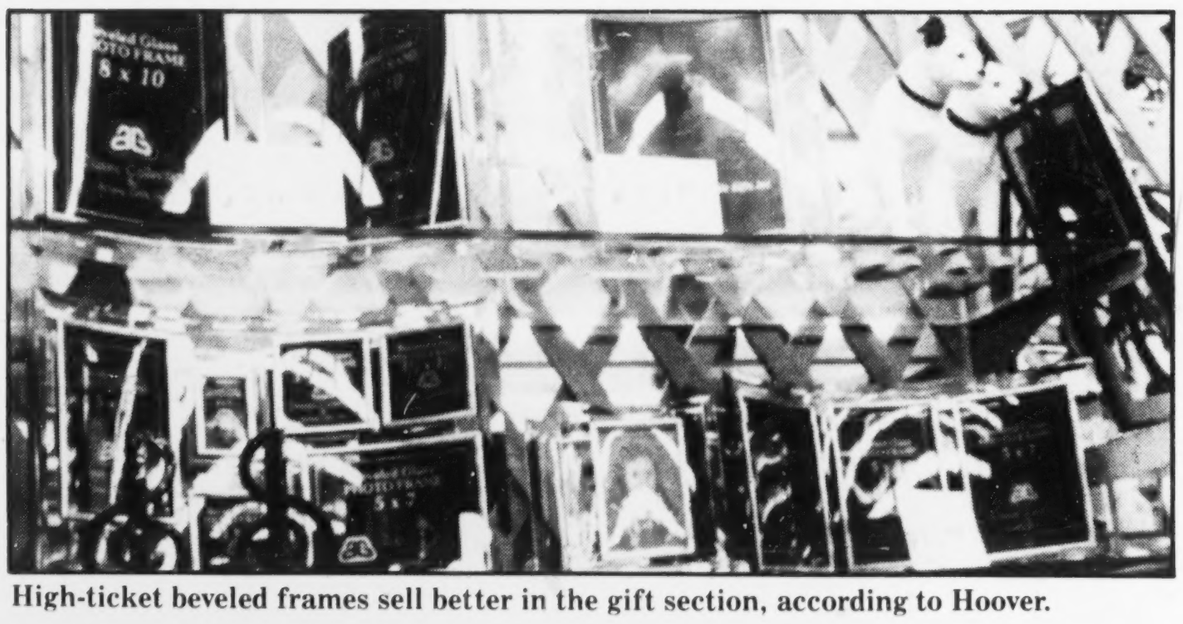
Here are Jim Hoover's Ten Commandments on selling picture frames:

1. Locate the department away from photo to funnel traffic into other areas of the store—but still put it in a highly visible place near the front. "Frames are part of a purposeful shopping trip," says Hoover, "not impulse. People pick up their processing, go home and decide on the enlargements—and then return to the store for the frames."

2. Use the gondola end for an uptraded line of frames. Guild pulled low-profit paper from the picture frame end and replaced it with a wood-stained fixture (furnished by the supplier) for $7.80 to $20 frames. In a companion move, accessories (7 lineal feet) were moved from hardware to adjoin the frames (20 lineal feet).

3. Split off the top ticket line of beveled frames (up to $34) to glass shelves in the gift section because they are primarily purchased for gifts.

4. Carpet the shelves of the picture frame gondola to upgrade the department and prevent frames from slipping off the shelf.



High-ticket beveled frames sell better in the gift section, according to Hoover.

5. Select a knowledgeable supplier and keep abreast of the best sellers.

6. Code-date incoming merchandise at the same time it is priced, and keep the department looking good by assigning one clerk to spend a few minutes daily straightening the stock.

7. Rotate the frames, with new stock in back of the old. "If you don't," says Jim Hoover, "old styles can stay hidden for months."

8. Mark down items 50% after six months. If carryover stock still remains, work out a credit arrangement with the supplier.

9. Use framed pictures for promotions only. "We've had success only with advertised items [16 in. x 20 in. and 20 in. x 24 in.]," says Hoover, "but not with staples. Certain styles appeal to people in certain areas. Items often become fads and you end up selling 2 out of a selection of 20."

10. Be flexible in your shelf layout. Most stores graduate the sizes—from the smallest on top to the largest on the bottom. "We flip-flopped 5x7 with 8x10 sizes which account for 80% of the business, putting the 8x10's on top. We found out from the photo department that 8x10 is the most popular enlargement in this store. Also, instead of having small frames (2½ x 3¼, 3½ x 5, 4x5, etc.) in a horizontal position on the top shelf, we broke them into a two-shelf vertical display. This gives them higher visibility while maintaining an unbroken line of 8x10's and 5x7's on the two top shelves," Hoover concluded.